

COUNTY OF SAN DIEGO – HEALTH AND HUMAN SERVICES AGENCY
MENTAL HEALTH SERVICES
MENTAL HEALTH SERVICES ACT (MHSA) COMMUNITY SERVICES AND SUPPORTS
(CSS) PLAN
REQUESTS FOR PROPOSALS (RFP)
FREQUENTLY ASKED QUESTIONS & CORRECTIONS

Please review all the Questions and Answers and Corrections in preparation for a response to a Mental Health Services MHSA CSS Plan RFP. These items have been generally applicable to all the RFPs issued as part of the Mental Health Services MHSA CSS Plan. Some items may not apply to a specific RFP. If you have additional questions on the application of these corrections and frequently asked questions to a specific RFP, please contact the Procurement Contracting Officer assigned to the RFP.

BuyNet II Files:

1. Q The files available on BuyNet may include revision notes that narrow the document page on screen and in print copies. How can the document format be corrected?
 - A The documents are Microsoft Word files. To correct formatting and delete the notes, select “View” on the Microsoft Tool Bar and un-select “Markup.”

Representations and Certifications:

2. Q Item #1 (Not-for-Profit Organizations) states: “attach proof of status...” Where should this proof be attached – as part of a separate appendix, immediately behind the Representation and Certifications page, or in an attachment section at the end of the proposal itself?
 - A Attach the proof immediately following the Representations and Certifications page.

RFP Terms and Conditions:

3. **Corrections:**
 - 2.1. The correct reference is to “Submittal Requirements” rather than “Evaluation and Submittal Requirements.”

Questions and Answers:

4. Q A Table of Contents is required. What should be included in the Table of Contents?
 - A The Table of Contents is used by the Source Selection Committee evaluating proposals to locate the Offeror’s response to specific submittal and program requirements. The Table of Contents should be sufficiently detailed to allow SSC members to quickly locate sections in the Offeror’s proposal addressing submittal and program description requirements. Offerors are reminded to accurately number pages and ensure that Table of Content references are accurate. Labeling or indexing major sections of the proposal using tabs is also helpful for the Source Selection Committee in locating the Offeror’s response to specific requirements.
5. Q What is an alternative proposal? Where are the specifications provided? How and when are they evaluated?
 - A An alternate proposal proposes performance of the work requirements in a manner other than those required in the Statement of Work. An alternate proposal will only be considered if the Offeror also submits a complete proposal conforming to the requirements of this RFP. Generally, an Offeror submits an alternative proposal that the Offeror feels would be more effective in meeting program goals through it may not meet all program and service performance and operational requirements specified in the RFP. The description and requirements for an alternative proposal are included in Section 3 of the revised RFP Terms and Conditions. An alternate proposal to an Offeror’s submitted proposal must include a P&C 600 clearly identifying it as an “Alternate Proposal” and clearly identifying the proposal(s) to which it is an alternate. Multiple alternate proposals may be submitted. Alternative proposals will be considered during the proposal evaluation process.
6. Q There are multiple programs in this RFP. Is the intent to award one or multiple contracts? Can an awarded contractor subcontract for services?
 - A Unless specifically indicated otherwise, the County expects to award one primary contract for each RFP. The awarded contractor can subcontract for services. If Medi-Cal or Medicare services are required and will be provided, the primary contractor must be the Medi-Cal/Medicare certified provider. The primary contractor can subcontract for services that are not Medi-Cal/Medicare billable.
7. Q Proposals are to be “securely fastened.” What is required for a proposal to be securely fastened?
 - A Securely fastened requires that the pages of each submitted original proposal, and all copies of the proposal, stay together as originally bound while being transported, handled, and used by Source Selection Committee members

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and County staff. Because of large variation in the thickness of proposals, in paper quality, and in methods of fastening, no specific fastener is required. If the proposal stays together when held by the binding and shaken, the fastener is usually adequate.

Submittal Requirements:

8. Corrections:

- 8.1. Second Paragraph - CDs with the Offeror's proposal have become an effective tool in evaluating proposals. The second sentence in the second paragraph in this section is revised to require 5 CDs to be submitted with the Offeror's hard copy original and copies:
"Submit the proposal files on 5 CDs, plus an original and [number (##)] copies of each proposal prior to the date and time specified in the cover letter and PC600 form."

Questions and Answers:

9. Q CDs with the Offeror's proposal are also required to be submitted with the hard copy original and copies. What is the acceptable file format(s)? Some proposal documents may only be available as "hard-copy" and not available as computer readable files. How should those files be submitted?
- A Microsoft Office or Adobe Acrobat (.pdf) files are acceptable. Documents only available as hard copy should be scanned and the scan file submitted in a Microsoft Office or Adobe Acrobat readable format. If the Offeror prefers to not scan files, a readable file listing the documents not scanned should be included on the CD.

Submittal Requirements, "Experience, Proposed Organization, Management and Staffing:"

10. Q Are the Offeror's resume and references and staff resumes included in the "Experience, Proposed Organization, Management and Staffing" section of the proposal or can they be attached to the section or the proposal?
- A Resumes and references may be submitted as an attachment to the proposal section or to the proposal. If the resumes and references are provided in an attachment at the end of the section or at the end of the proposal, it should be clearly referenced with the body of the section. Resumes and references should not be included in any appendix that provides additional information not referenced in the proposal as such appendices to the proposal may not be considered in evaluation of the proposal.
11. Q "Organization and Staffing," "Job Descriptions" – Program staff position job descriptions are required. Is it necessary to also provide organizational level job descriptions?
- A No, if the staff positions only serve at the organizational level. Offerors should only provide job descriptions for program staff positions, including administrative, support and direct service staff. However, some program staff positions may also serve as organizational level positions and would be included. As a guideline, Offerors should include job descriptions for all Program staff positions identified in the Budget, Schedule I.

Submittal Requirements, "Program Description:"

12. Correction:

- 12.1. Insert a new paragraph below the first paragraph in this section:
"To assist in clearly describing how the work specified in the Statement of Work will be accomplished, Program Description Attachments such as flow charts, tables, and other graphic aids may be included. All Program Description attachments shall be cited within the Program Description, and will be included in the Program Description page limit."

Questions and Answers:

13. Q If an RFP is part of a series of RFPs, the Submittal Requirements may provide Offerors an opportunity to submit a "Linked Proposal." What is a linked proposal? Where are the specifications provided? How and when are they evaluated?
- A A linked proposal is a proposal in which the Offeror identifies performance or operational efficiencies and increased value for the County that the Offeror could achieve by being awarded a contract for 2 or more programs from a series of RFPs. An Offeror may submit a linked proposal in addition to a proposal meeting the RFP minimum requirements for each of the programs that the Offeror proposes to link. A linked proposal must include a P&C 600

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clearly identifying it as a linked proposal and clearly identifying the proposals to be linked. Multiple linked proposals may be submitted.

The description and requirements for a Linked Proposal Budget are specified in the Submittal Requirements section. In addition to the required summary budget(s), the Offeror must submit a narrative that outlines and quantifies any expected cost efficiencies, any performance and operational efficiencies, and how the efficiencies are expected to be achieved.

Linked proposals will be considered in the proposal evaluation process only after the Offeror's individual proposals included in the linked proposal are determined to meet minimum requirements and are in the competitive range. Linked proposals will only be considered in awarding contracts within a series of RFPs.

14. Q First Paragraph, "Prepare/Provide a program description..." – This paragraph requires the "Program Description to follow Exhibit A, Statement of Work format. However, the following paragraphs/sub-paragraphs outline a different format and numbering than is provided in Exhibit A, Statement of Work. What is the format for "Program Description" and what are the items that should be included?

A Follow the format and numbering provided in the Submittal Requirements, "Program Descriptions." Each submittal requirement item must address and clearly reference applicable Exhibit A, Statement of Work (SOW) paragraphs/items. At minimum, the reference should include the SOW paragraph/item number. In general, the submittal requirement items duplicate the sequence of paragraphs/items in the SOW and SOW number references are sequential. If multiple program components are specified in the Statement of Work, the Offeror should use a program description format that most clearly outlines and explains the proposed program, including, if appropriate, repeating the submittal requirements items for each component.

To ensure that the proposed program description is complete, Offerors should address all paragraphs/items included in Exhibit A, Statement of Work.

15. Q Should every Statement of Work requirement and definition be addressed in the Program Description?
- A Statement of Work requirements should be addressed in the Program Description even if they are not specifically listed in the submittal requirements. Definitions, such as target population, do not need to be repeated. However, Offerors should demonstrate in their description their understanding of the definitions. An Offeror's demonstrated understanding of program and service intent, including definitions and requirements, is a factor in proposal evaluation.
16. Q The program description page length is specified. Should this be single-spaced or double-spaced?
- A Single-spaced is allowed. Offerors are reminded that proposals should be clear and readable.
17. Q "Implementation Plan" – A July 1, 2006 start date for program services is optimistic. Can this date be changed?
- A For purposes of the RFP, Offerors should assume a July 1, 2006 date for services to begin. Specific start dates will be negotiated with awarded Contractor based on the Offeror's proposed Implementation Plan tasks/actions and length of time to complete the tasks/actions. The County is interested in the earliest possible start date for services and for the program to be fully operational as soon as possible following the start date. The Offeror's Implementation Plan should be designed to accommodate a later start date. The Offeror's Plan should identify "risks" that may or are likely to delay tasks/actions in the timeline (including the services start date and services fully operational date) and any mitigation of those risks. Also, to avoid any issues in contract award and to reduce the time required for contract negotiation and execution, the County requests that Offeror's and their legal counsel review the draft Pro Forma Contract and exhibits provided in the RFP prior to submission of the Offeror's proposal.
18. Q "Implementation Plan" – Is the Implementation Plan included in the Program Description page limit? Should the Plan be included in the "Program Description" section of the proposal or can it be attached to the section or the proposal?

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- A The Implementation Plan is included in the page limit for the “Program Description.” The Plan may be submitted as an attachment to the “Program Description” section of the proposal and should not be attached to the end of the proposal. If the Plan is provided in an attachment at the end of the section, it should be clearly referenced with the body of the section.
19. Q If any information in the RFP and subsequent Addenda conflict with information in the MHSA CSS Plan, does the MHSA CSS Plan take precedence?
- A For purposes of the RFP, the RFP and Addenda takes precedence. However, Offerors should immediately identify any potential conflicts to the County. Conflicts with the MHSA CSS Plan may limit funding that is critical to the award and continuation of contracts and implementation of MHSA CSS funded programs.
20. Q Should charts, graphs, and flow-charts be included in the body of the program description or at the end? Should they be attached as appendices to the proposal?
- A Charts, graphs, flow charts and similar clarifying or supporting information can be included where the Offeror determines it can be most effectively presented. Such information should be clearly labeled. If the information is provided in a section at the end of the program description, it should be clearly referenced with the body of the program description. If the information is included in the program description, it is subject to the program description page limitation. If the information is included as appendices to the proposal, it is not subject to the page limitation. However, as appendices, they may not be considered in evaluation of the proposal.

Submittal Requirements, “Financial Information:”

21. Q When will the County’s MHSA CSS Plan be approved by the State? If the State requires changes in programs specified in the Plan how will those changes be implemented?
- A State Department of Mental Health is currently reviewing the County’s Plan. The process is expected to be completed before contracts are awarded. No changes are anticipated to be required in contracts. If any State DMH changes are required they will be addressed in contract negotiations prior to award of a contract.
22. Q “Budget” – What is the funding available for these programs?
- A Estimated funding amounts are available in the on-line Technical Resource Library (TRL), <http://www2.sdcountry.ca.gov/hhsa/ServiceCategoryDetails.asp?ServiceAreaID=551>, and the TRL located at Mental Health Services Administration (3255 Camino del Rio South, San Diego). Estimated funding amounts are only available at these locations. The estimated funding amounts are provided in a multi-year matrix that covers the initial contract period and option years and specify, as applicable, estimated Mental Health Service Act (MHSA) Community Services and Support (CSS) funding (including any one-time-only start-up and training funding), any current other funding (for services being re-procured), and any estimated revenue. For purposes of the RFP, Offerors should consider the Fiscal Year funding amounts estimated for MHSA CSS funded programs and services to be maximum amounts in the specified Fiscal Years.
23. Q “Budget” – Program budgets must be submitted. Are there standard Budget formats available and where are those formats?
- A Unless otherwise specified in the Submittal Requirements, Program Budgets must be submitted on the Mental Health Services standard Budget Template. The template is available in the on-line Technical Resource Library (TRL), <http://www2.sdcountry.ca.gov/hhsa/ServiceCategoryDetails.asp?ServiceAreaID=551>, and the TRL located at Mental Health Services Administration (3255 Camino del Rio South, San Diego). Estimated funding amounts are only available at these locations. Individual Budgets must be submitted for each of the Fiscal Years in the initial contract period projected to start July 1, 2006 (Fiscal Year 2006-2007 through FY 08-09) and each of the specified option years including the 6 month extension option.
24. Q “Budget” – How many budgets are required?
- A Submit a separate program Budgets for each contract Fiscal Year specified in the Budget section of the Submittal Requirements and, if applicable, a separate “Start-Up” Budget. The number of Budgets can include a “Start-Up” Budget, Budgets for the initial contract period Fiscal Year 2006-2007 through the specified initial contract term

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(generally 3 Fiscal Years for contracted client services and 1 year for contracted administrative support services), Budgets for the contract option years (generally 3 years for client services and 1 year for administrative support services), and a Budget for the six-month extension option (.5 year); up to a possible total of 8 Budgets. The Start-Up Budget should identify the costs of fully implementing the program. The Program Budgets should include the costs of providing MHSA funded services, any other funded services, and any MHSA one-time-only funded training or other services. Include any multiple program components in the same budget. Separate components may be included as “Cost Centers.” Multiple program budgets allocations should be explained in the Budget Narrative. Training costs and other costs met by MHSA one-time-only funding may not extend past the Fiscal Year 2007-2008 budget (June 30, 2008). Line items for training services funded by MHSA should be clearly labeled line items. Full explanation of MHSA funded training services may require additional and clearly labeled line items and a separate budget narrative section.

25. Q “Budget” – If Medi-Cal revenue is anticipated for these programs, is Medi-Cal certification required to submit a proposal?
- A All Medi-Cal revenue programs must be Medi-Cal certified on program start-up. If the Offeror has not obtained Medi-Cal certification when the Offeror’s proposal is submitted, the proposal must include the Offeror’s plan to obtain certification. The plan should identify the certification tasks and steps and a timeline.
26. Q “Budget” – Can we use Medi-Cal funding to enhance services?
- A Medi-Cal funding has already been included in the estimated funding used to develop Medi-Cal program requirements. The estimated amounts used are specified in the Technical Resource Library (TRL). Offeror’s can propose a different amount of projected Medi-Cal funding and include that amount in their Budgets. The Budget Narrative should clearly explain and justify expected program revenues.
27. Q “Budget” – If Medicare revenue or services are anticipated for these programs, must the contractor have the ability to provide and bill for Medicare covered services? Will preference be given to Offerors who are able to bill for Medicare eligible services immediately rather than Offerors who must first become certified to provide Medicare covered services?
- A Yes, if Medicare revenue or services are anticipated, the awarded contractor must provide, bill, and accept payment for Medicare services. Offerors may submit proposals pending Medicare certification. The certification process should be addressed in the Implementation Plan. The immediacy of an Offeror’s access to revenue to help meet the costs of the proposed program or to provide an expanded or enhanced program will be considered, among other factors, in the evaluation of the Offeror’s proposal.
28. Q “Budget” – The estimated funding amounts provided are the same for all Fiscal Years. Can a Cost-of-Living Adjustment (COLA) factor be included in the Budgets?
- A Generally, no. Each Fiscal Year Budget is limited to the estimated funding amounts provided. If the Offeror includes a COLA or other budget or program adjustments to meet anticipated cost changes, the method for meeting those cost changes while maintaining performance and operational requirements must be clearly explained in the Budget and any Budget narrative.
29. Q “Budget” – Is a Budget narrative required?
- A A Budget narrative is not required. However, a Budget narrative to justify and explain costs is strongly recommended, especially if there are unusual Budget line items or there are substantial Budget changes year-to-year. Budget narratives also help Source Selection Committee members evaluating proposals to more readily and better understand how the Budgets are linked to the proposed program description and to staffing requirements and functions.
30. Q “Financial Statements” – Some organization Financial Statements are very long and would add significantly to the volume of material provided in an Offeror’s proposal. May a modified Financial Statement be submitted? Is there a page limit on the Financial Statements? If an appendix to the proposal may not be considered by the SSC, where should the Financial Statements be located in the proposal?

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- A The required Financial Statement, as submitted by an Offeror in the proposal, will be used to evaluate the Offeror's financial capability in implementing and maintaining the proposed program. Modified or summary Financial Statements may be submitted. However, Offerors should ensure that modified or summary Financial Statements include sufficient information for a complete and accurate evaluation of the financial capability of the Offeror's organization to implement and maintain the proposed program.

If the Offeror is a current contracted service provider for the County of San Diego, Health and Human Services Agency (HHSA) and has submitted the required annual financial statement to HHSA, Agency Contract Support (ACS), or has submitted a financial statement for evaluation in response to a recent HHSA procurement for contracted services, and the annual financial statement is current, a duplicate financial statement is not required to be submitted with the Offeror's proposal. However, it is the Offeror's responsibility to ensure that ACS has the required financial statement and that it will be available for evaluation or has been evaluated. The Offeror should indicate in the proposal that a current financial statement or evaluation is available through ACS and clearly identify the financial statement by contract or procurement process (RFP) #.

Financial Statements submitted as part of an Offeror's proposal do not have a page limit.

Public organizations and agencies submitting a proposal, because of assumed financial capability, may submit an electronic copy of the Financial Statement on the required CDs rather than as a hard copy. SSC members will use a CD if a copy is needed to review financial information. A "hard-copy" is not required.

Financial Statements should be clearly labeled. Financial statements should not be included in any appendix that provides additional information not referenced in the proposal as such appendices to the proposal may not be considered in evaluation of the proposal.

31. Q "Start-Up Funding" – If Start-Up funds are identified, how can these funds be used? What is the period for expending these funds? Is the 8%-12% a requirement or guideline? Can they be used for lease costs or tenant improvements?
- A The limitations for the use of one-time-only Start-Up funding is specified in Submittal Requirements section, "Start-Up Funding." The funds are available to assist the awarded contractor in meeting the initial one-time-only costs to become fully operational. The funds are limited to expenditures for the period from contract execution through the first six-weeks of program ramp-up (from the start date of service delivery). This period is expected to overlap the program Budget start date, July 1, 2006. The 8%-12% is a guideline. The funds cannot be used for expected ongoing costs (such as increased lease, utility, or insurance costs). The funds can be used for one-time capital or tenant improvements required to implement the MHSA component of the program. Those costs must not be part of claims for ongoing overhead and operational costs. A separate Start-Up Budget using the Mental Health Services Budget Template is required.
32. Q "Start-Up Funding" – What is the length of the Start-Up time period?
- A There is no specified Start-Up period. Start-Up funding equal to 6 weeks (1.5 months) of annual funding is available. Costs eligible for Start-Up funding must be incurred between the date of contract execution and up to 6 weeks after program services begin. The County plans for program services to begin no later than July 1, 2006. The program is expected to be fully operational as soon as possible after that date. Some programs are expected to achieve a full caseload within a specified time period from the date the program is fully operational.
33. Q "Start-Up Funding" – Can Start-Up funds be used for training even though separate training funds are also specified for MHSA CSS funded programs. What are the restrictions on funding training?
- A Start-Up funds can be used for staff training. Start-up training is staff training necessary for the Offeror to staff and implement the program. The training may include, though is not limited to, standard organizational training required by the Offeror of all employees and training necessary to meet job description requirements. The MHSA CSS funds for training are expected to help fund any specialized training necessary for implementation of MHSA CSS funded programs and program enhancements. Planned "Staff Development/Training" is a line item in the

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standard Budget should be included as a line item in the Start-Up Budget and may be included as a line item in the Fiscal Year Budgets. Training should be explained in the Budget narrative.

Pro Forma Contract:

34. Q Article 4, “Compensation,” “Method of Reimbursement,” “Cost Reports,” Paragraph 4.4.4 – If a standard financial software, such as QuickBooks, is used to maintain program financial information, can the required cost report be submitted in a format developed in that financial software rather using the County form?
- A Cost Reports must be submitted in the standard County format. If the standard County format can be duplicated using the Offeror’s financial software, it is not necessary to use the County standard form.
35. Q Article 13, “Use of Documents and Reports,” “Ownership, Publication, Reproduction And Use of Material,” Paragraph 13.2 – This paragraph restricts the Contractors use of program data and information. What is the intent of this paragraph?
- A The intent of this paragraph is to help protect the County’s interest in program and client information and data and assist in preventing the unauthorized use and publication of program and client information and data. It does not prevent a Contractor from using and publishing the information and data as necessary to meet program requirements, including development of training or education curriculum. The Contractor’s use or publication of the information and data outside of meeting program requirements must be in compliance with Federal, State, and County policies and regulations and must reviewed by the County prior to use. If County HHSA Mental Health staff are unable to make a determination on use or publication, the use or publication will be referred to County Counsel for review and a determination of whether or not the information and data may be used or published as requested.

Pro Forma Contract, “Exhibit A - Statement of Work:”

34. Q If any information in the RFPs and Addendums conflict with information in the MHSA CSS Plan, does the MHSA CSS Plan take precedence?
- A For purposes of the RFP, the RFP and Addendum takes precedence. However, Offerors should immediately identify any potential conflicts to the County. Conflicts with the MHSA CSS Plan may limit funding that is critical to the award and continuation of contracts and implementation of MHSA CSS funded programs.
35. Q “Geographical/Regional Service Area(s)” – Does the contractor have to observe the same holidays as the County? A contractor may have to pay holiday pay to stay open when the contractor schedules a holiday that is on a different day than the County.
- A County guidelines are that programs and services observe County holidays. Offerors would need to consider the guidelines when developing program operating hours and Budgets.
36. Q “Geographical/Regional Service Area(s)” – An Health and Human Service Agency (HHSA) service region or regions are specified. What are the zip codes included in the specified service region(s)?
- A The HHSA service regions, defined by zip codes, are available in the on-line Technical Resource Library (TRL), <http://www2.sdcounty.ca.gov/hhsa/ServiceCategoryDetails.asp?ServiceAreaID=551>, and the TRL located at Mental Health Services Administration (3255 Camino del Rio South, San Diego).

Pro Forma Contract, Exhibit B, Insurance Requirements:

37. Q Should a copy of the Offeror’s insurance certificate be included in the proposal?
- A No, a copy of the Offerors insurance certificate is not required with the Offerors proposal. The Offeror can indicate that adequate insurance is held by the Offeror or is available to the Offeror. A copy of any required “certificates of insurance and amendatory endorsements” will be required prior to execution of a contract with the awarded contractor.